WorldPay™

MERCHANDT PORTAL
VALUE AT YOUR FINGERTIPS
Many of our reports — including the Deposit Summary, Transaction Lookup, Transaction Summary and Chargeback Detail reports — allow you to pull information from three levels:

• Corporate
• Location
• Terminal.

The Corporate level displays all of your transaction information for all of your locations.

The Location level displays all of the transaction information that occurs at a specific location.

The Terminal level allows you to view the activity from a specific terminal.

All of our reports let you sort by their headings, like “Transaction Date/Time,” “Card Number” or “Amount.”

How To: The “How To” sections provide you with useful information on the individual reports and self-service options, including report descriptions and helpful hints on how to use them.

Search: Change your report options without ever leaving the screen. Modify dates, change terminals — and if you prefer to view the report full screen, just select the “Hide Report Options” button.

To help get you started, visit the “Credit/Debit” menu and access the “Most Popular” category.

1. Visit https://Portal.WorldPay.us
2. Click on the "Create My Account" button
3. Complete the form on the next screen. Be sure you have:
   • Your Customer ID (starts with 1000 followed by six digits as 1000XXXXXX and is found on your monthly statement and on the Terminal ID decal that is included in your Welcome Kit)
   • The last four digits of the bank account number used for your transaction deposits
4. You’re now ready to login.

IN THE FORMAT YOU PREFER

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WorldPay’s Merchant Portal is your source for self-service tools that can help manage your payment processing account. You can also generate a wide range of reporting information, from summary reports to details about an individual transaction — all specific to your business’ card transactions. You’ll also be able to:

• Quickly update important demographic information such as your banking information or who you’d like to be the preferred contact person for your business
• View and respond to chargeback and retrieval requests at the touch of a button
• Order supplies for your terminal, such as receipt paper and printer ribbons

...and many other time-saving services and options that help you spend more time making the sale and growing your business.

VALUE AND CONVENIENCE ANYTIME, ANYWHERE

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EASY TO USE

Working closely with our customers, business owners just like you, we built the WorldPay Merchant Portal to provide quick access to the level of transaction detail and self-serve functionality you need.

Sorting: We don’t assume the best way for your transaction information to be displayed. Instead, we offer you the categories you need to search — and you save valuable time by pin-pointing the exact information you want.

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This gives you the flexibility to choose what information you need and the amount of detail you want.

They’re also viewable in several formats, including a printer-friendly version, and may be downloaded for use with Excel®.

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ONLINE REPORTING PROVIDES QUICK ACCESS TO YOUR PAYMENT DATA

Developed with the input of businesses just like yours, the WorldPay Merchant Portal provides a wealth of comprehensive reports to help you save time...and money.

- Real-time reporting means transaction data is available when you need it
- Access daily and monthly activity reports on demand...which can provide time-critical information to help identify and correct potentially costly problems, such as downgrades and chargebacks
- Track a transaction from five minutes ago or 18 months ago.

DEPOSIT SUMMARY

Our customers love the Deposit Summary report since it helps you verify the exact amounts deposited into your bank account.

Quickly reconcile amounts settled with amounts deposited and verify payment by third parties, such as American Express®. Plus, the deposit history is available for up to two years worth of processing.

To access your Deposit Summary report, go to the “Credit/Debit” section. Select “Deposit Summary” from the drop-down menu under the “Deposit Information” section.

By pulling a report from a specific terminal, it will display the Batch Number with a link to all the transactions settled in that batch. This allows you to verify that all transactions processed on that day were settled and charged at the correct amount.

Transaction information for up to 40 days can be accessed at one time.

DAILY ACTIVITY

The Daily Activity report shows you real-time transaction activity at any of your locations throughout the day.

View transactions almost at the same time as they’re being run – and potentially solve customer concerns before they become problems.

How? Say a customer calls you a few minutes after his purchase and tells you the amount charged to his credit card was incorrect. Pull up this report to see his transaction and then take the appropriate actions to avoid a chargeback.

To access the report, go to the “Credit/Debit” section in the top menu bar and select “Daily Activity” from the “Transactions” section.

View the Daily Activity report at either the Corporate level or for an individual terminal. To search the Corporate level for a transaction, you’ll need the full card number. Information at the Terminal level can be pulled for up to 45 days at a time.

MONTHLY STATEMENT

Your most recent monthly statements can be accessed anytime directly from the homepage.

There’s no need to wait for paper statements to arrive in the mail or deal with the hassle of storing paper copies.

With your monthly processing activity available at your fingertips, you can check if your locations are batching out within the correct timeframe – which can help you reduce the number of downgrades – or see how many transactions are being keyed versus swiped – which can help you reduce the possibility of chargebacks.

Looking for older statements?

Go to the “Credit/Debit” section in the top menu bar and select “Monthly Statements” from the drop-down menu to see your statements from the past 13 months.

Each month’s report is printer-friendly and viewable at the individual location level. You can also receive an email notification telling you when your statement is ready to view online.

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Do you sell gift cards? If not, you might want to consider it. Many of our customers find that gift cards increase sales and build customer loyalty. The Gift Card Summary report gives you information on how many gift cards were purchased, activated and redeemed.

Select “Gift” from the top menu to see the Gift Card Transaction Summary report. This report and others, like the Customer Activity Totals and Transaction Detail, lets you see how your gift cards are being redeemed, how often and by whom. Use this information to create special marketing programs and incentives for your customers.

To start your gift card program, contact your Account Executive or call 800.859.5965.

To protect consumers, card issuers allow cardholders various options to contest or chargeback a transaction. It’s important that you – as a business owner – respond to chargebacks quickly to reduce the impact they may have on your bottom line. This is especially important when the chargeback was requested in error. The report provides much of the information you need in order to research and dispute a chargeback, including the length of time you have to respond. Search options include the date of transaction, terminal number and card number. Use this information to locate the appropriate sales receipt or other sales documentation so you’re able to efficiently dispute the chargeback.

Select the Chargeback Detail report from the “Credit/Debit” menu at the top of the page, under the “Cardholder Disputes” section. The Chargeback Detail report is viewable for up to 45 days at one time and is archived for up to 24 months.

Attention Sales Staff: Do you sell gift cards? If not, you might want to consider it. Many of our customers find that gift cards increase sales and build customer loyalty. The Gift Card Summary report gives you information on how many gift cards were purchased, activated and redeemed.

Select “Gift” from the top menu to see the Gift Card Transaction Summary report. This report and others, like the Customer Activity Totals and Transaction Detail, lets you see how your gift cards are being redeemed, how often and by whom. Use this information to create special marketing programs and incentives for your customers.

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When customers dispute a credit or debit card charge, a chargeback could occur. A chargeback is a transaction that is billed back to you after the sale has settled.

WorldPay has created the Chargeback Manager to help give your business a head start on the chargeback process – potentially saving you valuable time and money.

Avoid the traditionally time-consuming and paper-based process of responding to chargebacks. Rather than using fax or mail, the Chargeback Manager allows you to handle the process electronically from start to finish – potentially eliminating days or weeks – in the chargeback dispute process.

WHEN IS A CHARGEBACK?

A chargeback occurs when a customer disputes a credit or debit card charge. This means the flow of funds is reversed, with funds being removed from your account and returned to the cardholder’s account.

The WorldPay Chargeback Manager is a valuable tool that helps you quickly supply the information we need to assist in resolving chargebacks on your behalf within the card networks’ limited time frames. This is just one way WorldPay helps act as your advocate with the various card networks.

RESPOND MORE QUICKLY TO CHARGEBACK REQUESTS WITH THE CHARGEBACK MANAGER

Communicating directly with WorldPay via the online Chargeback Manager is faster than traditional mailing and faxing. View real-time updates to retrieval requests or chargebacks. Use the site to upload any chargeback-related documents. All you need is a scanner or other camera-enabled device – including a smart phone, tablet or digital camera – to capture a clear image of a document and upload it to the Chargeback Manager. You can also print and download chargeback information, as well as add notes and other comments or records related to individual occurrences. This helps you resolve these matters more quickly and enables you to better serve your customers when chargebacks occur.

THE CHARGEBACK MANAGER HELPS MINIMIZE THE IMPACT OF CHARGEBACKS

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EDIT BANK INFORMATION FOR TERMINALS. Change your banking information...often without having to make an extra phone call to Customer Care.

MANAGE USER ACCESS. Need to add, modify or delete a user account? This section allows you to do that and more. You can assign your employees access to some or all of the reports inside of your Portal while safeguarding your processing information.

EDIT YOUR ACCOUNT. Enhance the security of your Portal account by using this screen to regularly update your account password.

EDIT BUSINESS INFORMATION. Make sure your company’s address stays current so you don’t miss any important information.

MANAGE TERMINALS. When your business has multiple locations or multiple terminals—or both—remembering your terminal information can be challenging. Here you can create or change nicknames for terminals in any of your locations, saving you the time you’d have had to spend searching for specific terminal numbers.

ORDER SUPPLIES. Running low on paper or printer ribbon? Submit a new order for each of your locations or re-stock using the information from your previous order. The fee will be debited from your credit card settlement bank account, so there’s no separate bill for you to worry about.

SCHEDULE REPORT DELIVERY. Schedule reports to be delivered directly to your email inbox—automatically! Available reports can be conveniently sent to your inbox, daily or monthly. With this option, you won’t need to login to access selected reports—in fact, they come directly to the email address you choose.

SELF SERVICE: YOUR ACCOUNT AT YOUR CONVENIENCE

Our self service options give you control over your account—often without having to make a call to Customer Care. Changing your business address, modifying your bank account information and even ordering supplies for your terminal is quick and easy with our Merchant Portal. Of course, if you ever have questions or need help, our 24/7, US-based customer service team is standing by. Just call 800.859.5965. We’re always happy to hear from you.